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NOVEMBER/DECEMBER 2014

HIT 50

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Introducing your Hot50

There are a few things that make Kidscreen's first-ever Hot50 ranking special. **1.** There is no other list like it that recognizes excellence across five key kids entertainment sectors—broadcasting, production, distribution, licensing and digital media. **2.** The list of the hottest companies in the biz this year was determined entirely by you, Kidscreen's community of 15,000+ subscribers.

3. There's nothing better than the recognition of your peers.

**Kidscreen Hot50 companies,
we salute you!**

kidscreen

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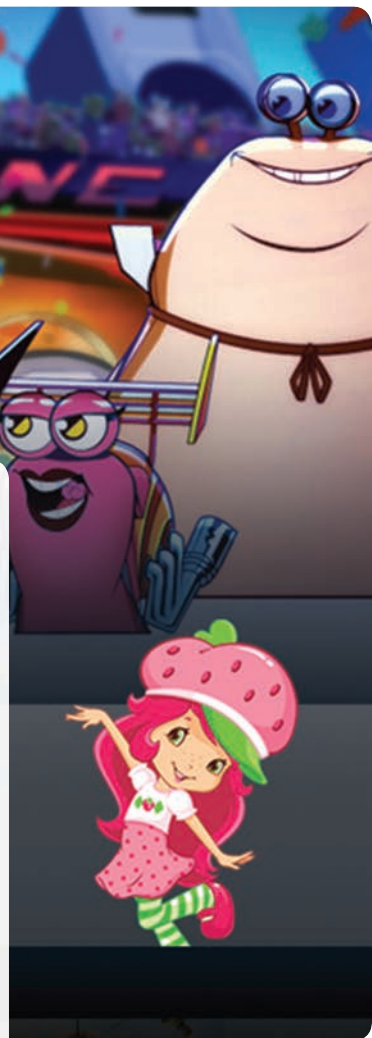
Hot 5

Five key things that shaped the business in 2014

1

Netflix gets serious about kids TV

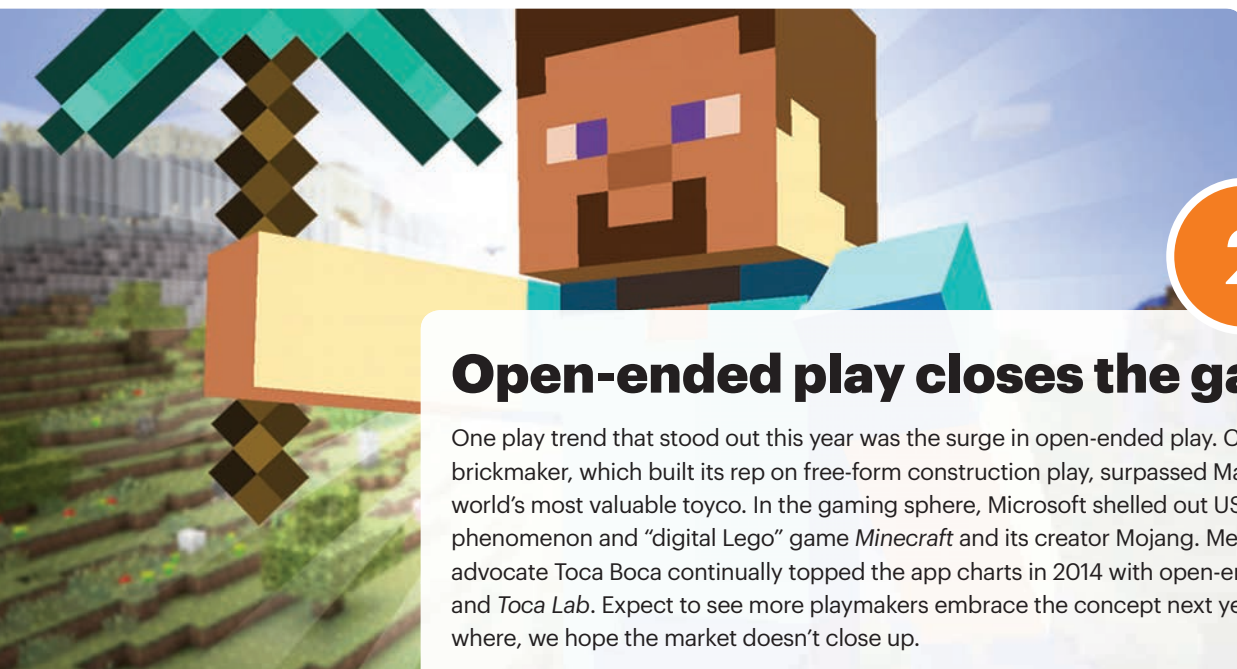
Just three years after its launch, Netflix Kids (initially dubbed Netflix Just for Kids in 2011) has become a first-stop shop in the international world of kids TV. It kicked off its original content plan with a bang, commissioning 300 hours from DreamWorks Animation in 2013. It quickly followed up in 2014 by poaching Brian Wright from Nickelodeon to head up its Kids & Family originals program and then made a slew of exclusive deals with the likes of Mattel Playground Productions and Scholastic Media. The SVOD giant also hired Carla Fisher as its director of product innovation for Kids & Family to further refine its kids user experience and recently moved ex-Disney exec Andy Yeatman over from a content acquisitions role to the newly created post of director of Global Kids. What it all points to is that Netflix is delving even deeper into kids content and is acting increasingly like a traditional broadcaster, becoming more selective about what it acquires and makes. Finally, companies like DWA, Mattel (*Ever After High*) and Saban Brands (*Popples*) are now betting that Netflix has the kids audience share required to drive consumer products sales in North America—all three have original exclusive deals for merch-intensive properties set to launch in 2015. If ever there was a clear definition of the term game-changer in kids TV, it might just be spelled N-E-T-F-L-I-X.



2

Open-ended play closes the gap

One play trend that stood out this year was the surge in open-ended play. Case in point: Lego. The brickmaker, which built its rep on free-form construction play, surpassed Mattel this September as the world's most valuable toyco. In the gaming sphere, Microsoft shelled out US\$2.5 billion to acquire global phenomenon and "digital Lego" game *Minecraft* and its creator Mojang. Meanwhile, freedom-in-play advocate Toca Boca continually topped the app charts in 2014 with open-ended titles like *Toca Nature* and *Toca Lab*. Expect to see more playmakers embrace the concept next year. For the sake of kids everywhere, we hope the market doesn't close up.



3

DHX's shopping spree

With the December acquisition of Nerd Corps Entertainment for US\$50 million, DHX Media capped off an unrivalled kids TV buying binge. Along with snapping up the 400-person animation studio in Vancouver, DHX picked up Canada's Family Channel and Disney XD/Disney Junior Canada for US\$160 million in July, and shelled out US\$30 million for *Degrassi* producer Epitome Pictures in April. DHX is now a key broadcaster in the country and arguably its largest animation producer. The growing conglomerate is clearly poised to change the landscape of kids TV in Canada, if not globally, through its extensive web of co-productions, acquisitions and third-party service work. That's a tough act to follow for 2015, DHX, a tough one.

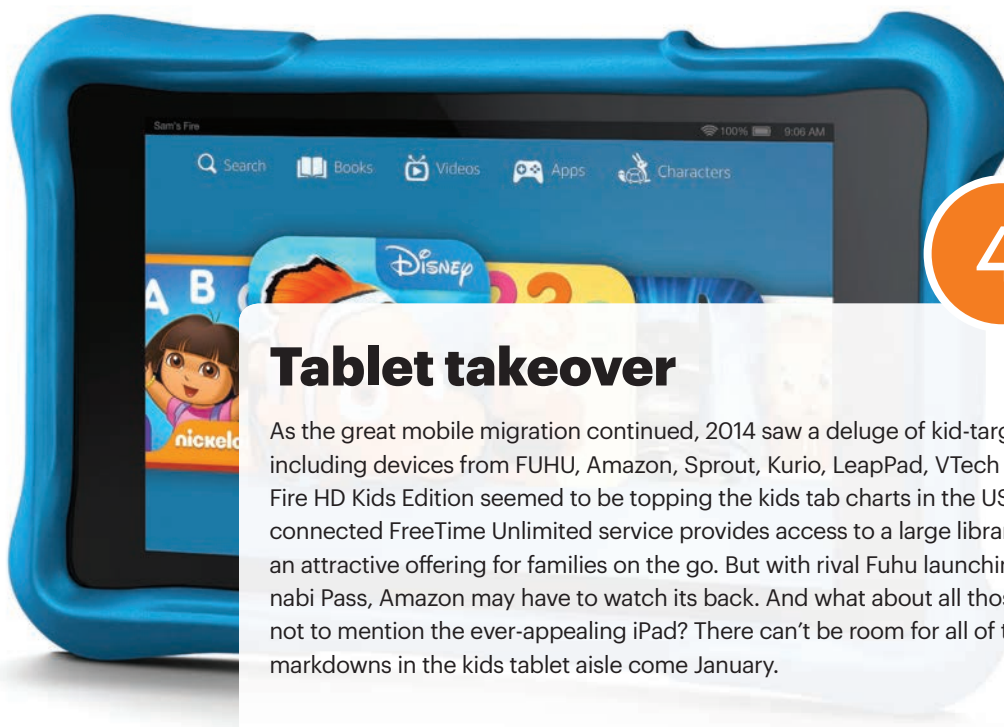


photo: Polyart

4

Tablet takeover

As the great mobile migration continued, 2014 saw a deluge of kid-targeted tablets hit the market, including devices from FUHU, Amazon, Sprout, Kurio, LeapPad, VTech and CNK Digital. Amazon's Kindle Fire HD Kids Edition seemed to be topping the kids tab charts in the US at Christmas time. The tablet's connected FreeTime Unlimited service provides access to a large library of shows, games and eBooks—an attractive offering for families on the go. But with rival Fuhu launching its own kids content service, nabi Pass, Amazon may have to watch its back. And what about all those other tabs on the kids market, not to mention the ever-appealing iPad? There can't be room for all of them. We'll be on the lookout for markdowns in the kids tablet aisle come January.



5

Deal us in

DHX Media aside, this year has been a big one for M&As in the TV industry. Leading the list is Viacom's purchase of British free-to-air broadcaster Channel 5. This year also saw India's Toonz Entertainment snap up Spanish producer/distributor Imira Entertainment, Paris-based Ellipsanime pick up the assets of French animation company Moonscoop, and Corus buy the final 50% of Teletoon Canada to claim outright ownership. And don't forget Entertainment One's acquisition of rival distributor Phase 4 Films. We're hoping this wave of consolidation might produce a new indie crop next year. Fingers crossed.



photo: Andrew Magill

Changing the channel

SVOD provider Netflix Kids takes the top broadcast spot

Netflix Kids' ranking as the hottest of the Hot50's broadcasters definitely reflects the impact video streaming services are having on the broader kids entertainment industry. The SVOD giant introduced its Just For Kids section to North American audiences in 2011 and quickly stacked its offering with leading third-party TV series and movies for kids and families. Then in 2013, it sealed a deal with DreamWorks Animation, commissioning 300 hours of original programming—the largest original content deal in Netflix's history. And it's been on an original programming tear ever since.

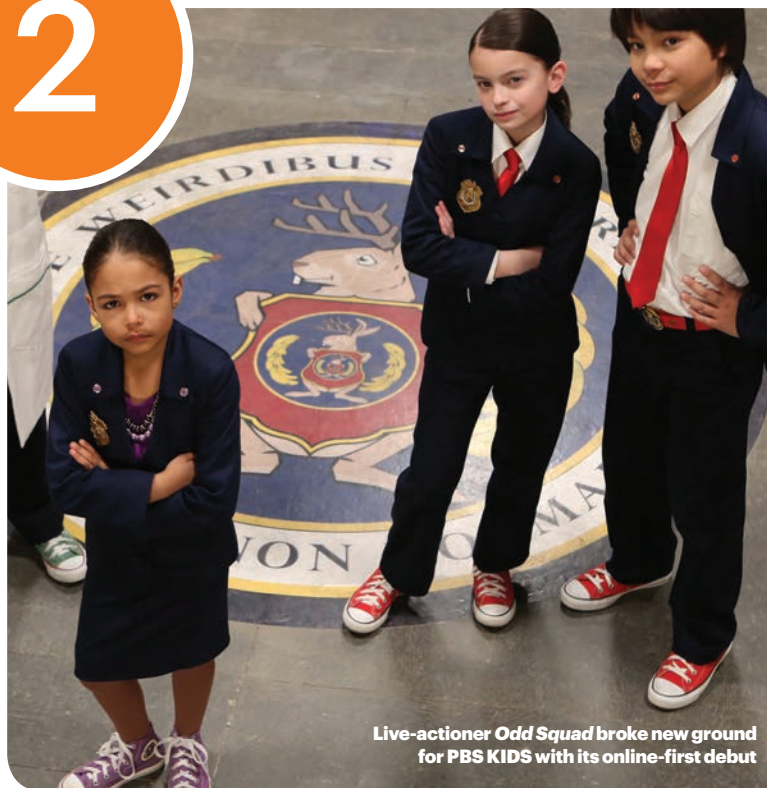
The DWA partnership delivered its first original animated series *Turbo F.A.S.T.* in 2013, followed by *Veggie Tales In the House* last month. Madagascar spin-off *King Julien* and Shrek-based *Puss In Boots* arrive this month, with *Dinotrax* expected for 2015. Original series deals have also been struck with the likes of Saban (*Popples*), Mattel (*Ever After High*), Scholastic Media (*The Magic School Bus 360*), 41 Entertainment (*Kong—King of the Apes*) and Rainbow (*Winx Club WOW: World of Winx*).

In addition, 2014 saw Netflix tap ex-Nickelodeon exec Brian Wright as its first-ever head of original kids and family programming.

As Netflix continues to launch across Europe in 2015, and expand its global subscriber base of 50 million (and counting), expect to see more content partnerships emerge for the SVOD pioneer.

41 Entertainment's *Kong—King of the Apes* landed a Netflix original deal this year

2



Live-actioner *Odd Squad* broke new ground for PBS KIDS with its online-first debut

The cross-platform innovator: PBS KIDS

PBS KIDS ramped up its cross-platform efforts this year, sewing up content deals with Netflix, Apple TV and Google Chromecast (a first for a kids channel). And along with having four of the top-15 shows for kids ages two to five on broadcast television in the US in June, according to Nielsen, the channel's *PBS KIDS Video* app also generated more than 243 million streams in the same month. Additional milestones this year include the first-ever, half-hour version of *Sesame Street* and a digital-first launch new original series *Odd Squad*, which debuted full eps online prior to its broadcast debut.

PBS KIDS VP of children's programming Linda Simensky and its GM of children's media, Lesli Rotenberg, both agree that it's great to be recognized by one's peers. "We have a really strong identity that makes us stand out and I think that is what's being recognized," Rotenberg says. "It comes down to the mission that drives all of the work we do, which is about using the power of media to spark children's natural curiosity and help them develop their own passions."

BROADCASTING

Still growing: CBeebies draws 2.2 million UK kids weekly

Led by top-rated series, including recent BAFTA winners *Katie Morag* and *Sarah & Duck*, a strong digital presence across its apps and iPlayer platform, as well as more drama and female-driven programs, the BBC's dedicated preschool channel continues to grow its audience of 2.2 million UK kids every week. "Our reach is up more than a percentage point compared to this time last year, which is really good considering all of the things that can take children's attention like video games and YouTube," says CBeebies controller Kay Benbow.

The channel also benefited in 2014 from its newly expanded quota of acquired programs that allows for fewer repeats of older shows and more room for new acquisitions and co-productions. "Our partnerships have been great to bring different content to the public service broadcaster," says Benbow.

Its first-ever co-pro with Sesame Workshop led to the successful debut of *The Furchester Hotel* in September, and new co-pros like *Twirlywoos* with Ragdoll and DHX are in the works.

"We have a wonderfully rich portfolio, so it's a huge honor to be recognized by other members of the broadcasting industry, because they understand how hard it is to constantly deliver top-quality content," notes Benbow.

Top-rated CBeebies original *Katie Morag* took home a BAFTA this year



3

Co-pro *PAW Patrol* is pulling down big ratings for the Nick Jr. block

4

Nickelodeon

On the strength of consistent ratings for animated co-pro *PAW Patrol* (with Spin Master) and new curriculum-based programs like *Wallykazam!*, Nickelodeon's preschool-targeted Nick Jr. block has been on a roll this year. The kidsnet is also winning in the development department via its full international shorts program and first-ever open call pitch at Comic-Con. Plus, its ground-breaking *Nick App* continues to provide kids with their favorite content whenever and wherever they want.

Cartoon Network US

Since a number of shakeups this year at Turner, new Cartoon Network president and GM Christina Miller has been leading the channel in bold directions. Its first-ever primetime miniseries, fantasy/comedy *Over the Garden Wall*, aired successfully over five consecutive nights in November and the new *Cartoon Network Anything* app is keeping kids engaged with randomized short-form content.

5



CN broke new ground with primetime
toon miniseries *Over the Garden Wall*

NO. 1 IN BROADCASTING

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ABC3/ABC4Kids

By extending the broadcast hours of both ABC3 and ABC4Kids in February, Australia's ABC Children's has improved its content alignment, targeting and messaging. In the first half of the year, weekday programming at 6:30 p.m. for ABC4Kids grew by 27%. Its cross-platform viewership has also been strong, helping the broadcaster to land sixth place in our Hot50.

6

Nowhere Boys scored ratings for ABC3 and a Kidscreen Awards nom this year



Sheriff Callie's Wild West was a quick ratings draw for Disney Junior



7

Disney Junior

The dedicated preschool channel tallied up many accomplishments this year, including 52 consecutive weeks as the number-one preschool net on US cable. But none was more indicative of the changing ways in which kids and families view content than the app-first launch of new series *Sheriff Callie's Wild West*. During the lead-up to its linear premiere, the program generated more than 23 million views on the WATCH Disney Junior app, then went on to set record TV ratings for the channel.

BROADCASTING

Sprout Network

US preschool channel Sprout's Hot50 performance has been driven by strong original programming (*The Sunny Side Up Show*, *The Chica Show*, *Ruff-Ruff, Tweet & Dave*), its reach of more than 55 million homes, and a VOD offering that boasts more than 1.5 billion views. Five recently greenlit originals might just ensure the net's reappearance on the list in 2015.

8



Perennial Sprout performer, *The Sunny Side Up Show*

Original movie *Zapped* helped DC reach the top of the tween ratings pile

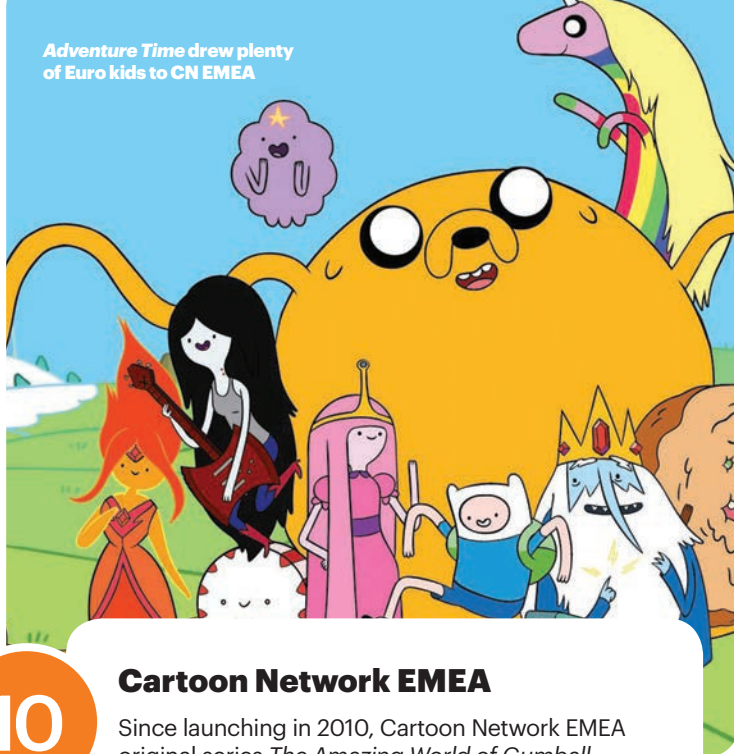
9

Disney Channel

It's been a transformative year for the House of Mouse in the broadcasting department, as Disney Channel is in the midst of rolling out a new worldwide brand design. Ratings across all of its demos have been strong in 2014—original movie *Zapped* earned the top spot on US cable in late June for kids two to 11 and six to 11.



Adventure Time drew plenty of Euro kids to CN EMEA



10

Cartoon Network EMEA

Since launching in 2010, Cartoon Network EMEA original series *The Amazing World of Gumball* has gone on to air in 126 countries, reaching 36.5 million viewers in EMEA alone. The BAFTA winner's success this year, along with fan favorite *Adventure Time*, and the brand-new *Mixels* animated shorts, helped cement the network's stellar performance in 2014.

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A winning slate

With its most robust crop of originals yet, Cartoon Network US climbs to the top

Cartoon Network US original series like *Adventure Time*, *Regular Show* and *Steven Universe* now reach 386 million homes across 192 countries worldwide. In fact, the net's studio is riding a wave of popularity with viewers and has the ratings to show for it. In the second quarter of 2014, originals drove CN to the number-one TV ranking across all boy demos for early primetime and total daytime in the US.

"Looking at our recent ratings success, our original programming is really popping across the board," says president and GM Christina Miller. "We're proud of all of our shows, but most recently we're particularly pleased with the network's first primetime miniseries *Over the Garden Wall*."

Premiering over five consecutive nights in November, the average delivery of the five episode premieres won the timeslot on all US cable television among targeted boy demos ages two to 11, six to 11 and nine to 14.

"We're proud of every piece of the series, from all of the talent, to the way it was marketed on- and off-air. It has a beautiful look and feel and was one of the high points of the year in terms of quality of content," says Miller.

She adds that the studio's top Hot50 ranking in Production is a testament to the way the studio finds, embraces and nurtures young talent. "It's a wonderful acknowledgment for the studio, for [CCO] Rob Sorcher, his production and development teams, and all of the creators. Establishing such a creatively led studio has been key to our success under Rob's leadership," she says.



1



PRODUCTION

CN's first-ever miniseries *Over the Garden Wall* capped off a stellar year for its originals program

The studio currently has 11 series in production, including the second season of toon comedy *Numb Chucks*



Rebranded 9 Story ramps up its pipeline

Toronto's newly rebranded 9 Story Media Group takes our second spot, riding on recent accomplishments like nabbing three Emmy wins for preschool co-pro *Peg + Cat*, successfully integrating Toon Boom technology into its database, and greenlighting a record number of projects within the last year. Currently, the studio has 11 series in production, including second seasons of *Numb Chucks*, *Daniel Tiger's Neighborhood* and *Camp Lakebottom*.

"With our investors buying into the company, we now have more resources to grow our production slate and create new partnerships with other companies around the world," says VP of production Tanya Green. "It's rewarding to be listed among so many amazing companies like Cartoon Network, DreamWorks and Jim Henson, but also with some great Canadian studios such as Nerd Corps and DHX."

2

DHX expands output with acquisitions

Deal after deal, Canada's DHX Media continues to cement itself as a true 360-degree global company with an increasingly diverse kids and family library of original and acquired properties. On the heels of its acquisition of Family Channel and a trio of Disney channels earlier this year, DHX inked a deal with Sony Pictures to produce a *Cloudy with a Chance of Meatballs* prequel series, and started production on 2D-animated comedy *Supernoobs* for Teletoon Canada.

The company is also currently working with UK-based Darrall Macqueen on a contemporary version of the iconic series *Teletubbies* for CBeebies that should be ready to air by the end of 2015. And it's planning to expand further into live-action content following the purchase of Degrassi franchise producer Epitome Pictures.

"Even though we are a large company, our peers see what's on the development slate and what moves into production, and know that we are taking on truly creator-driven projects," says VP of kids development Stephanie Betts. "Seeing how the industry has evolved over the last three years after some grim ones, and being acknowledged for all of the hard work that's actually paid off, is huge."

3

PRODUCTION

Thanks to DHX's purchase of Ragdoll, iconic preschool series *Teletubbies* is getting a reboot



4

Sinking Ship Entertainment

With a growing production slate, Toronto's Sinking Ship hired former Kids' CBC exec Carla de Jong in October to helm its production unit. Now in its 10th year, the company had a significant 2014 with the debut of original Amazon live-action/CGI series *Annedroids*, an Emmy nom for preschool series *Dino Dan: Trek's Adventures*, and the successful cross-platform launch of math series *Odd Squad* for PBS KIDS.



Sinking Ship celebrates its 10th year with a bunch of new series like *Dino Dan: Trek's Adventures*

6

Nerd Corps Entertainment

It may have ended the year with its US\$50-million sale to DHX, but Vancouver, Canada-based Nerd Corps was firing on all cylinders in 2014. Along with its first-ever North American theatrical release based on its TV series *Sluggterra*, the company netted new international sales for original comedy *Endangered Species* and put projects *The Deep* and *George Greenby* into full development.



Nerd Corps branched out this year with its first-ever preschool series *Kate & Mim-Mim*

Sesame welcomed its first UK co-pro, *The Furchester Hotel*, in 2014



5

Sesame Workshop

The nonprofit educational organization welcomed new faces and properties this year including Jeffrey Dunn as CEO and president, and BBC co-pro *The Furchester Hotel*—the Workshop's first series to launch globally on its YouTube channel. And now in its 45th season, *Sesame Street* continues to have an impact on audiences worldwide, whether it's emphasizing female empowerment to children in Afghanistan, or reaching a wider on-demand audience in China.

Doozers made tracks to Hulu as the first kids original for the SVOD

7

The Jim Henson Company

L.A.-based The Jim Henson Company expanded its audience across all platforms in 2014, thanks to the US debut of *Doozers*, its preschool co-pro with DHX, on Hulu, the video streamer's first original kids project. Meanwhile, long-running series *Dinosaur Train* continues as a ratings winner in 130 countries, and this fall saw the launch of new co-pro *Hi Opie!* and Disney movie *Alexander and the Terrible, Horrible, No Good Very Bad Day*.

DreamWorks Animation

The studio's historic deal with Netflix to produce and distribute 300 hours (1,200 episodes) of original kids content is moving ahead at lightning speed. After the debut of its first series *Turbo F.A.S.T.*, DreamWorks launched *VeggieTales In the House* in November. *All Hail King Julien* and *Puss In Boots* arrive this month, followed by *Dinotrux* in 2015.

8

DWA's latest *All Hail King Julien* bowed on Netflix in December

PRODUCTION

9

Amazon Studios

2014 marked the arrival of Amazon's first three original kids productions *Tumble Leaf*, *Creative Galaxy* and *Annedroids*. The retail giant's push into the kids SVOD space continues to roll with newly launched live-action series *Gortimer Gibbon's Life on Normal Street*, upcoming series *Wishenpoof!* from Angela Santomero, and six new greenlit pilots, which are expected to hit Amazon Prime in early 2015.

Amazon got three series off the ground this year, including *Creative Galaxy* from Out of the Blue

Renowned for its high-quality animation work, Brown Bag is branching out into originals in 2015

Brown Bag Films

Disney Junior's *Doc McStuffins* (animated by Brown Bag) debuted in 2012 to quickly become the number-one preschool show on US cable TV, and the Irish toon house has been moving from hit to hit since. Emmy-winner *Peter Rabbit* (produced by Silvergate Media) premiered to three million viewers on Nickelodeon in 2013 and is currently nominated for five more Emmys, while *Henry Hugglemonster* (Disney/Walker Productions) now airs on 140 Disney Junior channels. New original series in the production hopper for Brown Bag are *Cozy Island*, with Nelvana and Candy Bear, and *Gilbert and Allie* with France's Cyber Group.

10



DISTRIBUTION

Getting even sweeter

Indie distributor **CAKE** goes on a growth spurt

Building on a year of stellar sales for series like *Angelo Rules*, *Total Drama Island* and *Poppy Cat*, boutique London-based distributor CAKE Entertainment also saw success in SVOD land, becoming one of the top indie suppliers of kids content to Netflix.

"Linear broadcasters are still the meat-and-potatoes of our business, but the SVOD market, the digital market, has become increasingly more important. We're focusing on working with the Netflixes and the Amazons of the world," says Edward Galton, CCO and MD. "I'd say we've had a big shift in 2014 as a result of that in terms of the revenue that we've generated from the digital sector."

CAKE recently announced a third season for *Angelo Rules*, a co-production with TeamTO. France Télévisions remains on-board as commissioning broadcaster, and Cartoon Network International and Super RTL have both snapped up the series. New deals were also inked for season six of the *Total Drama* franchise, as well as for new acquisitions *Clay Kids* and *Space Racers*.

2014 saw principals Galton and Tom Van Waveren, CEO and creative director, buy back the 51% of CAKE that was previously held by now-bankrupt Zinkia.

"We feel very good about the path that we set ourselves on," says Van Waveren. "We're being more hands-on involved in our series, getting them off the ground, nurturing them through production and introducing them into the market."

To that end, CAKE has a whack of co-productions in the hopper for 2015, including animated comedies *Cheese Toastie Brain Monster*, *Herb & Ray's Yum* and *Chicken Invaders in Space*.

1

A third season of *Angelo Rules* shows CAKE's move into co-pros is paying off



Nick is sniffing out new territories for PAW Patrol

2

Puppy power: PAW Patrol drives TV sales for Nick

Led by the successful international rollout of smash hit *PAW Patrol* (a co-pro with Spin Master Entertainment) and the launch of VOD service My Nick Jr. in new territories, Nickelodeon is hitting new highs in distribution.

"The key thing for us is to continue to respond to the fact that linear and non-linear rights have now truly converged. We have to be aware that these kids are pretty much born with iPhones and tablets in their hands," notes Caroline Beaton, SVP of program sales at Viacom International Media Networks.

For the preschool demo, *PAW Patrol* is proving to have global appeal. It has been picked up by prominent terrestrial broadcasters like Five (UK), TF1 (France), Televisa (Mexico) and Nine Network (Australia).

"*PAW Patrol* is now in over 50 markets—not just lined up, but currently airing in primetime preschool slots," says Beaton. "The last time I saw something launch as quickly as that was probably *Dora the Explorer*."

Additionally, 2014 saw the number of Nick's branded blocks rise to 26, with recent in-flight blocks launching for the first time on British Airways and Emirates Air.

9 Story racks up big sales in Asia

With an impressive 1,700 half hours of content in its library, 9 Story Media Group remains steadfast in its mission to be the go-to for content in the kids space.

Expanding its international presence, 9 Story also more than doubled its revenue this year, following an output deal with Super RTL in Germany for more than 300 half hours.

"Our distribution strategy is really tailored to each show—there's no cookie-cutter approach," notes Natalie Osborne, managing director of 9 Story Enterprises.

Another growing market for the company is Asia. "We've had some great success, not only with the multi-territory pan-regional channels, but also in areas such as Korea, Singapore, Taiwan and Thailand," says Osborne.

In addition, 9 Story received investment from private media firm Zelnick Media this year, which opens up new opportunities in distribution.

"We have a very exciting 2015 ahead of us," says Osborne. "What the investment allows us to do is really have the resources to go after projects on a different scale, in particular with respect to acquisitions targets. We're looking for high-profile IPs or notable brands that we can either distribute or reinvigorate."

3



Nerds and Monsters is part of 9 Story's growing library of 1,700 half hours

DISTRIBUTION



Lily's Driftwood Bay is a key property for Henson's HIP

4

The Jim Henson Company

Henson created a direct-to-consumer link for its content by launching new online channel Jim Henson Family TV last August. It's currently available on platforms like YouTube, Roku and Xbox. The company also sold Hulu its first original kids series, *Doozers*, and launched and expanded HIP (Henson Independent Properties). Henson's banner for third-party distribution and licensing now reps series like *Lily's Driftwood Bay*, *Annoying Orange*, and *Elias: Rescue Boat Adventures*.

DISTRIBUTION



Zack & Quack proves its ratings might

5

Zodiak Kids

A long-time distribution heavyweight, Zodiak Kids struck a multi-title deal with Lagardère, licensing more than 100 hours to French diginet Gulli from Marathon Media and Tele Images. Its *Zack & Quack* preschool series also ranked in the top five across Nick Jr. UK and US, as well as on Treehouse (Canada) and EBS Korea. As for the year ahead, the distributor revealed at MIPCOM that it had been appointed to rep Amazon Studios' current slate of kids programming internationally.

Co-pro Winston Steinburger & Sir Dudley Ding Dong is the latest to join eOne's catalog

6

eOne Family

On the strength of stellar program sales for *Peppa Pig*, eOne makes the Hot50 cut. As it continues to roll out *Peppa* in major countries, including France (France 5 and Nick Jr.), Asia (Nick Jr.), Latin America (Discovery Kids) and Mexico (Televisa), eOne also secured sales for its new animated comedy *Winston Steinburger & Sir Dudley Ding Dong*. Amberwood's *The Magic Hockey Skates*, part of its third-party library, is also airing across the globe, thanks to eOne's distribution deals in Latin America, Central Eastern Europe, Canada, France, Switzerland, Norway and Ireland.





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Fireman Sam landed the first-ever content/product hub on Amazon



7

HIT Entertainment

HIT Entertainment has had a busy year. It formed an exclusive partnership with Amazon to launch preschool property Fireman Sam in the US, marking the first-ever branded shop on Amazon that includes content, digital media and consumer products. Outside the States, HIT's on a roll in Latin America, where it sold more than 300 hours of content to premier SVOD and mobile partners (Netflix, Claro Video, Veo and Movile). On the Netflix front, HIT entered into an exclusive deal with the platform for Pingu content in North and Latin America.

Sesame Workshop

The only company to make the Hot50 four times, Sesame Workshop had a banner year in distribution. *Sesame Street* spin-off *The Furchester Hotel* broke new distribution ground with its global debut outside the UK on Sesame's YouTube channel. The nonprofit also bowed its first-in-kind SVOD service Sesame Street Go. Other firsts this year were Sesame studio segments filmed in Colombia and "Word of the Day" eps filmed in Mexico, Chile, Argentina and other Latin American countries.

8

In a first for Sesame, studio segments were filmed in Colombia this year



DISTRIBUTION

Australian Children's Television Foundation

ACTF has seen a strong year of sales for its catalog. *Bushwhacked* and *World Animal Championships* made the global rounds, being picked up by Discovery Networks Asia-Pacific, Super RTL (Germany), Disney (UK) and TVO (Canada). Its live-action comedy *Worst Year of My Life Again!* also saw significant international sales, and in VOD land, sales of its live-action and factual series to National Geographic and Amazon/Lovefilm helped push the Aussie distributor into our Hot50.

9

Sales of new comedy *Worst Year of My Life Again!* helped push ACTF into the top 10

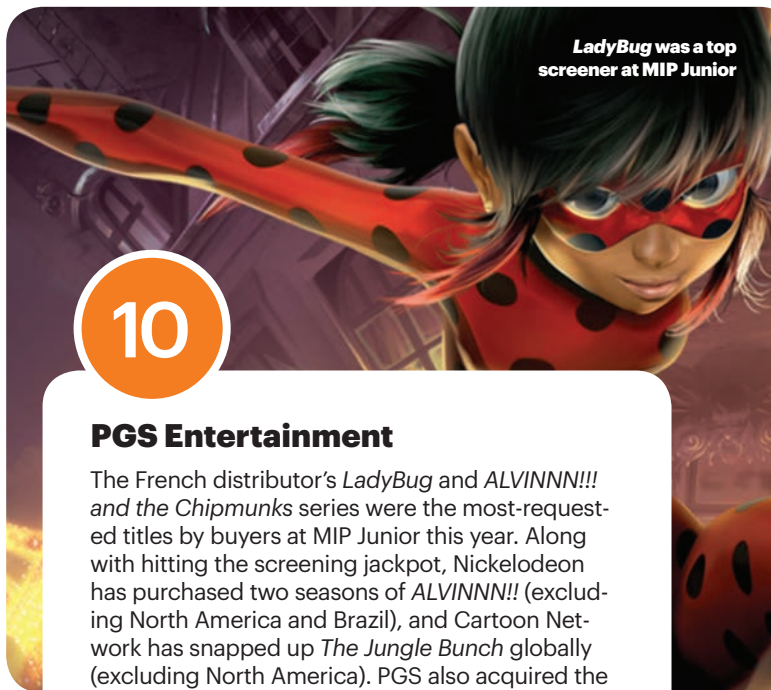


10

PGS Entertainment

The French distributor's *LadyBug* and *ALVINNN!!!* and the *Chipmunks* series were the most-requested titles by buyers at MIP Junior this year. Along with hitting the screening jackpot, Nickelodeon has purchased two seasons of *ALVINNN!!!* (excluding North America and Brazil), and Cartoon Network has snapped up *The Jungle Bunch* globally (excluding North America). PGS also acquired the international media distribution rights for the new *Monchhichi* reboot, and a raft of global sales for its catalog titles, including *Robin Hood: Mischief in Sherwood* and the Playmobil-inspired *Super 4*.

LadyBug was a top screener at MIP Junior



AUSTRALIAN CHILDREN'S TELEVISION FOUNDATION

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and media partners for helping us become one of the
Top 10 Distributors in Kidscreen's HOT50 for 2014.*



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The Lego Movie
grossed US\$468
million and boosted
Lego revenues by 11%

1

Brick by brick

Lego builds success with hit movie, licensed lines

Danish toymaker Lego had a year for the record books in terms of licensing growth. In September, the company surpassed Mattel as the most valuable toy company in the world. It was also one of the top-five toy brands across the US and Europe in the first half of 2014, and its consumer product sales based on the US\$468 million-grossing film *The Lego Movie* helped boost Lego's revenue by 11% for the same period.

Lego also expanded its sizeable in-bound licensing business this year with the launch of Lego Minecraft and Lego Disney Princess lines, a larger Lego Star Wars collection tied to the new Disney Star Wars *Rebels* TV series, and Lego Mixels with Cartoon Network. And the company recently clinched six Toy Industry Association Toy of the Year Award nominations.

When asked about Lego's Hot50 placement, VP of licensing and entertainment Jill Wilfert points to the strength of the toyco's partner relationships and its ability to produce a broad portfolio of licensed themes for all ages. "This recognition is a testament that our partnership approach, along with our overall licensing strategy, is working," she says. "It validates the way in which we curate the best properties, alongside our own themes, to deliver a compelling play experience to children, a differentiated offering for collectors, a lucrative line for retailers and a brand-building opportunity for our licensors."

With the news that the company will launch building sets tied to 2015's highly anticipated *Jurassic World* movie, Lego may rule the Earth next year, too.

LICENSING

US\$40 billion and counting for DCP

Given that Disney Consumer Products' properties generated more than US\$40.9 billion in global retail sales in 2013, it's not surprising that the House of Mouse division took the second spot on our Hot50 ranking. A juggernaut in kids play products, DCP continues to have a strong presence at all tiers of retail, thanks to hit properties like Frozen, as well as evergreen brands Disney Princess, Marvel and Star Wars.

This year saw the company further diversify its franchise portfolio, with lines for Star Wars Rebels, Marvel's Guardians of the Galaxy and its other superhero properties, and Disney's Planes Fire & Rescue. It also teamed up with US retailer Kohl's for an extensive DTR apparel line.

In the preschool realm, DCP created the Disney Junior umbrella brand at retail. With properties like Sophia the First, Doc McStuffins and Jake and the Neverland Pirates, it is on track to surpass the US\$1.8 billion in retail sales it generated last year.

Frozen, in particular, continues to be a standout success. Thanks to fan-friendly characters like Elsa, Anna and Olaf, the property was the fastest-growing franchise at retail in the first half of 2014.

2



Doc McStuffins is a standout for the bestselling Disney Junior umbrella brand

LICENSING

Dragons, PAW Patrol drive Spin Master's licensing success

With multiple accolades received for its products, including two Toy of the Year Awards, Family Fun Toy of the Year and Vendor of the Year from Walmart, Toronto, Canada-based toyco Spin Master is having a great 2014.

Having returned to profitability, with close to 20% growth in 2013, the company is on track to beat that figure this year, largely bolstered by stand-out sales of DreamWorks How To Train Your Dragon products and its own PAW Patrol toys.

"For 2014, a key driver for us was the How To Train Your Dragon franchise," says Adam Beder, SVP of licensing. "It delivered a tremendous amount of sales globally. In fact we over-indexed in North America, which is not always easy to do. Over 50% of sales were outside of North America for our Dragons business."

Also flying off toy shelves were Spin Master's PAW Patrol line and its Minecraft line of plush and vinyl. And looking ahead, the company has a number of partnerships on the go for 2015, including a master toy deal for Saban Brands' TV reboot of *Popples*, which will bow on Netflix. "We're really excited about Popples," says Beder. "With kids of the '80s being parents today, it's an enduring property that lends itself so well to the plush category. There's been nothing new or groundbreaking in that category in recent years."

3

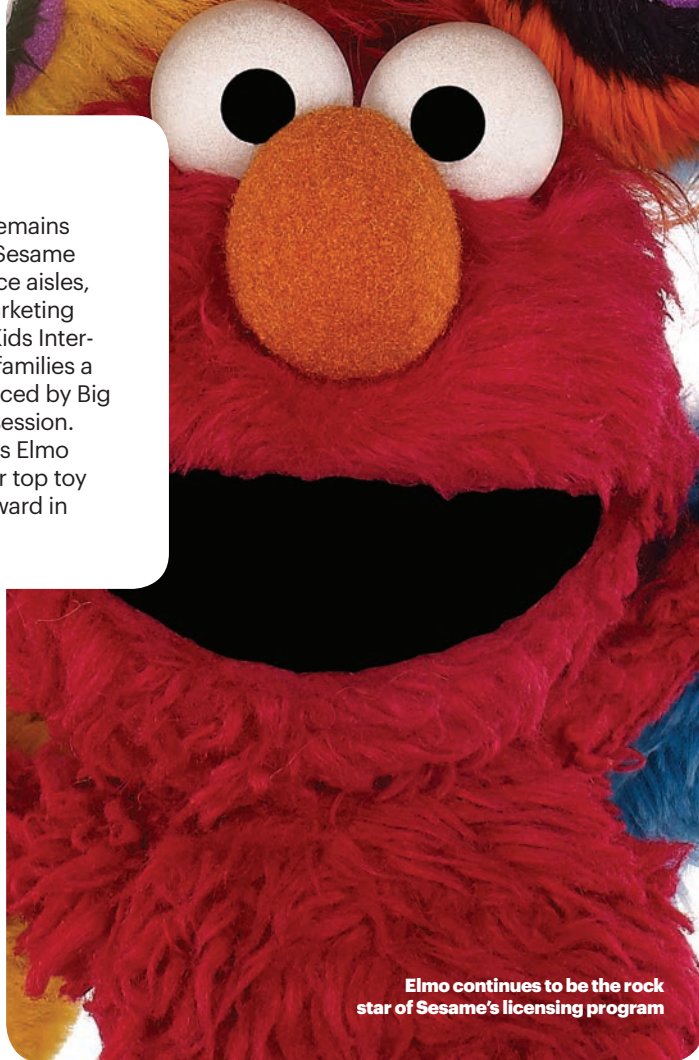
Spin's toys based on DWA's *Dragons* flew off shelves in 2014



4

Sesame Workshop

The nonprofit educational organization remains a champion in licensing. Most recently, Sesame Street characters appeared in US produce aisles, thanks to a partnership with Produce Marketing Association. It also partnered with TIFF Kids International Film Festival in Toronto to offer families a special *Sesame Street* screening introduced by Big Bird, along with workshops and a pitch session. Lovable Elmo also did his share. Big Hugs Elmo plush from Hasbro appeared on all major top toy lists last year, earning Sesame a TOTY Award in 2014 for infant/toddler toy of the year.



Elmo continues to be the rock star of Sesame's licensing program

5

eOne Licensing

Ten years and counting: Peppa Pig is a top preschool property across the UK, Italy, Spain and Australia, with a growing presence in Latin America, France and Germany. The brand is now ramping up in the US, marking a toy range that sold out at Toys 'R' US in mid-2014 and landing more TV exposure on Nickelodeon. eOne's also expanded Ben and Holly's Little Kingdom L&M program to key markets including Spain and Australia in the last 12 months.



Celebrating her 10th anniversary, Peppa products are topping sales charts across Europe

6

DHX Media

It's been a strong year for DHX Media in the licensing department. After acquiring Ragdoll Worldwide, DHX now owns big-name preschool brands like Teletubbies and In the Night Garden. Stateside, it has four TV-driven properties on retail shelves, as well as a global CP presence. DHX Brands, a dedicated consumer products arm for DHX Media, also made its debut, along with a brand-new office for subsidiary CPLG opening in L.A.



Yo Gabba Gabba! is a mainstay of DHX Brands' portfolio

7

Zodiak Media

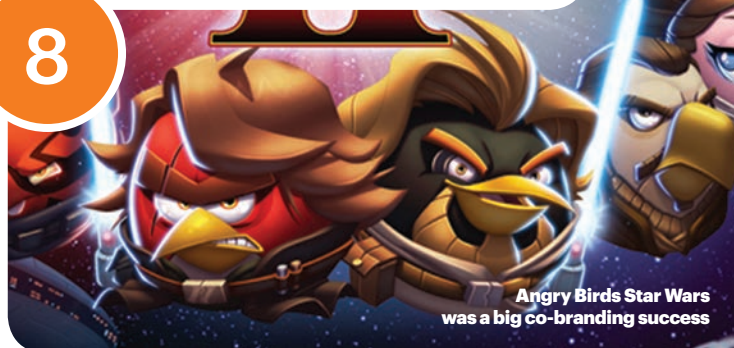
Zodiak's licensing arm focused on the launch of game apps and an extensive CP range for TV properties *The Ranch* and *Extreme Football* in France. The Paris-based office also renewed its *Totally Spies* partnership with Versailles, and closed several QSR deals, including one with McDonald's. And in the UK, *Mister Maker* now has more than 25 licensees, including Green's Cakes, RMS, PMS, Giromax, Dreamtex and Trademark.

The Ranch racked up a host of new deals in France this year

Rovio Entertainment

Rovio's *Angry Birds* CP program has generated in excess of US\$4.5 billion at global retail so far, and this year the licensor further spread its wings with Hasbro and Lucasfilm to launch *Angry Birds Star Wars* Telepods. The digital/physical mash-up won Digital-New Media Program of the Year at the 2014 LIMA Awards. New game and brand off-shoot *Angry Birds Stella*, meanwhile, has landed at retailers worldwide, including a significant deal with China's Alibaba, the world's largest online retailer.

8



Angry Birds Star Wars was a big co-branding success

Julius Jr.'s L&M program keeps growing for Saban Brands

9

Saban Brands

L.A.-based Saban Brands fills our ninth spot with hit properties *Power Rangers* and *Julius Jr.* leading the way. *Power Rangers* currently boasts more than 200 licensees worldwide, while *Julius Jr.* has a newly launched toy line through global master toy partner Fisher-Price, and is expanding into new categories. Next up for Saban is the relaunch of '80s hit *Popples*, with Spin Master on-board as master toy licensee.



LICENSING

Licensing magic
My Little Pony

10



Hasbro

The toymaker's 10th-place ranking is buoyed largely by the strength of its rebooted *My Little Pony* franchise. With more than 200 licensees, a new collaboration with Benetton, and a growing comics business with IDW, the brand continues to drive Hasbro's girls division. Expect more licensing growth from Hasbro in 2016 when its recently secured licensing deal with Disney Consumer Products yields new Disney Princess and *Frozen* merch.

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Going global

Nickelodeon's digital products make big international strides

Nick continues to innovate on the digital front as kidsnets navigate that closing linear/digital divide. This year started with the rollout of the My Nick Jr. personalized programming service in major new territories including the UK, US and China.

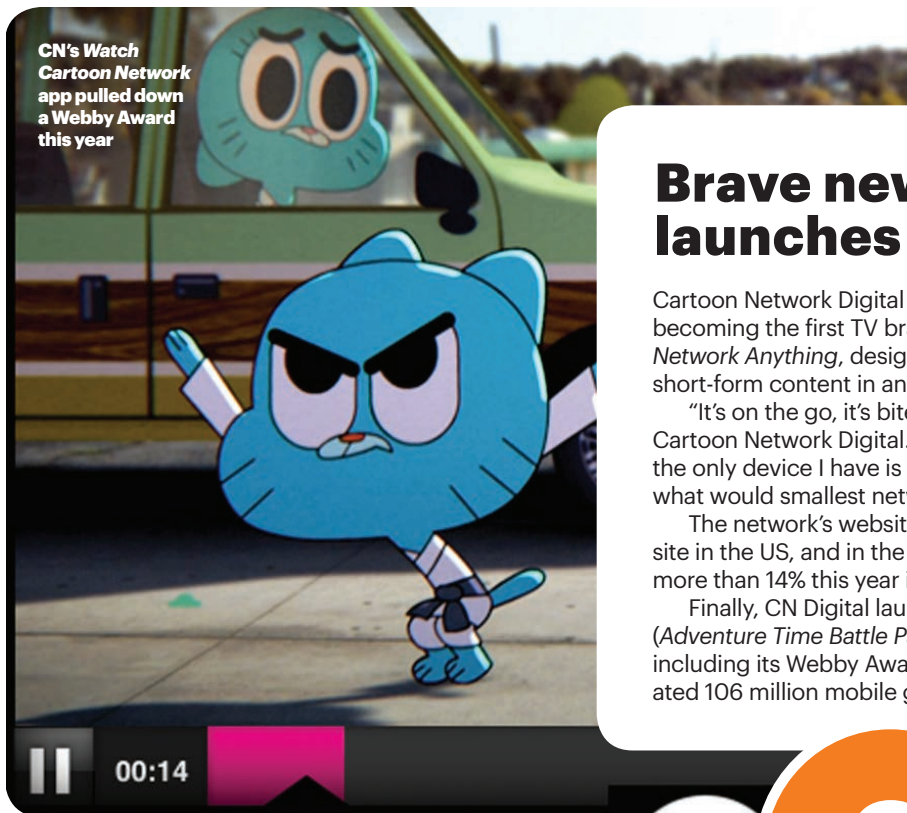
"We were very excited when we broke the US with Verizon, and also China with SMIT," says Philip O'Ferrall, SVP of digital at Viacom International Media Networks. "Those are the early deals. The beauty of the product is that it can roll out in any territory."

And as with all of its digital endeavors, the first-of-its-kind service supports the network's linear offerings. "My Nick Jr. is really about bringing the world of online and apps to linear television and adding another layer, which is parental control," says O'Ferrall.

The groundbreaking *Nick App* also continues to roll out internationally, with recent launches in the UK and Latin America. To date, it has been downloaded more than 11 million times globally. In fact, VIMN's paid app biz is up 30% year-over-year, thanks to releases like *Teenage Mutant Ninja Turtles: Rooftop Run*, *SpongeBob Moves In* and *Dora Appisodes: Perrito's Big Surprise*.

1

CN's Watch
Cartoon Network
app pulled down
a Webby Award
this year



Brave new waves: CN Digital launches micro-network

Cartoon Network Digital ramped up its multiplatform offerings in 2014 by becoming the first TV brand to debut a micro-network in app form. *Cartoon Network Anything*, designed specifically for small screens, serves up original short-form content in an almost roulette wheel-like fashion.

"It's on the go, it's bite-sized and it's random," says Chris Waldron, VP of Cartoon Network Digital. "It fits the, 'Hey I've got a few minutes to play and the only device I have is this one.' That was kind of the genesis of *Anything*—what would smallest network for CN look like."

The network's website also currently ranks as the #1 overall kids network site in the US, and in the top 10 for kids and boys two to 12, and has grown by more than 14% this year in terms of users.

Finally, CN Digital launched its first Multiplayer Online Battle Adventure (*Adventure Time Battle Party*) internationally, and its roster of 18 mobile apps, including its Webby Award Honoree *Watch Cartoon Network* app, have generated 106 million mobile game plays.

2

I is for Innovation: Sesame continues its digital streak

Nonprofit educational org Sesame Workshop rolled out a host of digital initiatives this year, notably launching its first-ever digital mag alongside a whack of new apps.

The new pub *Sesame Street S'More* is filled with games, audio, parenting tips and more. "We certainly have characters that kids love, and in linear format they can be engaged by them, but in digital format they can now interact with them, and that's great from an impact standpoint," says Carol-Lynn Parente, executive producer of *Sesame Street*, about the new product.

In addition, Sesame Workshop also made waves with last November's release of *Big Bird's Words*, an augmented-reality app that helps preschoolers build their vocabularies. "This is an amazing program that can identify everyday objects and give kids the right words to attach to those objects," explains Parente. "Our internal testing shows it increases vocabulary acquisition by as much as 40%."

New app
Big Bird's Words
helps increase
vocab acquisition
by as much as 40%

Play
A
Game!

3

4

TVOKids

With a unique ability to mix lessons and levity, pubcasters like TVOKids are gaining significant digital ground. Foremost among the Canadian channel's digital offerings this year were online games *Hot Spots: Safe or Not* and *Match-a Match-a Island*, which teach kids fire safety and spatial reasoning, respectively. Then there are eBooks like *The Mayor's Muffins* that are helping to ratchet up page views and downloads, with no signs of slowing down.



5

The nabi DreamTab gives kids the tools to get animating

nabi Play

Connect

Ut

DIGITAL MEDIA

FUHU

Dreaming big is paying off for FUHU. The California-based tablet maker just introduced its nabi Big Tab HD, an innovative large-size screen optimized for multiple players. And earlier this year, the nabi DreamTab, produced in conjunction with DreamWorks Animation, hit the market. It's the first kid-targeted tablet to include a suite of tools that enables users to make their own animated movies. Along with its innovative devices, FUHU also debuted Morpho Pods, tech-based toys that take physical-digital play to a whole new level.



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Cupcake's apps have racked up 9.7 million downloads



6

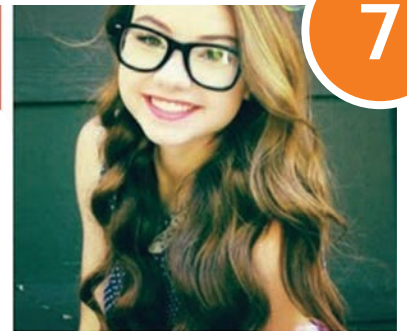
Cupcake Digital

Dropping in at #6, Cupcake Digital's licensed entertainment apps topped the charts throughout 2014. This year, the two-year-old app maker crossed the 9.7-million download mark for its apps based on properties like Strawberry Shortcake, Dora the Explorer, Peanuts and The Smurfs. It also forged partnerships with Hollywood studios to create promo apps for feature films *RIO 2*, *How to Train Your Dragon 2* and *The Nut Job*, and expanded its capabilities through the acquisition of eBook platform iStoryTime's developer zuuka.

7

AwesomenessTV

Surpassing five billion views earlier this year, AwesomenessTV continues to solidify its stance as the leading MCN for tweens and teens. Along with ancillary moves into publishing and fashion, it unveiled DreamWorksTV—its family channel featuring original kids programming made specifically for YouTube—and teamed with Hearst to launch *Seventeen* magazine's MCN spotlighting fashion, beauty and entertainment.



**ATV surpassed
5 billion views
this year**



Plug-in Media

If there's one company that's particularly dialed into kids' digital preferences, it's Plug-in Media. Its eighth-place ranking can largely be attributed to the success of its Tee and Mo preschool property. As UK pubcaster CBeebies' first digital-debut commission from an indie, Tee and Mo's site launched this year with games and animated shorts. Stateside, Plug-in Media's *Bubble Puppy: Play&Learn* app for Nickelodeon hit the #1 spot in the iOS app chart.

8

Plug-in's *Bubble Puppy* hit the top spot on the iOS chart Stateside



9

Budge Studios

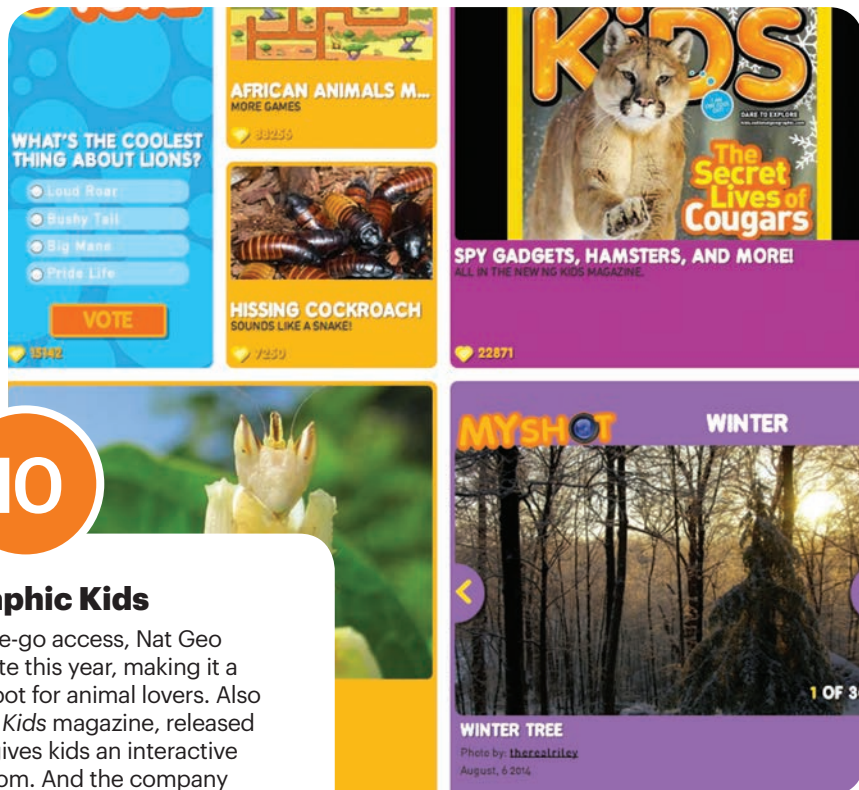
At 35 million downloads and counting, Budge Studios has had a busy 12 months. The app maker launched 10 new titles, including *Caillou Check Up*, *Miss Hollywood*, *Care Bears Wish Upon a Cloud*, and breakaway success *Strawberry Shortcake Bake Shop*, which has seen five million downloads. Expect more licensed fare in the future, as Budge has locked in licensing deals with classic entertainment properties Garfield, Crayola, Barbie, The Smurfs and Winx Club.

Budge launched 10 licensed apps in the last 12 months

10

National Geographic Kids

As kids want more on-the-go access, Nat Geo Kids revamped its website this year, making it a mobile-friendly online spot for animal lovers. Also going mobile is *Nat Geo Kids* magazine, released as a digital edition that gives kids an interactive look at the animal kingdom. And the company corralled its content to create a channel for over-the-top VOD provider Roku.



Nat Geo Kids' website went mobile in 2014

DIGITAL MEDIA



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